

Dubai Real Estate

Market Report 2025



AMMOS CREST

Ammos Crest Finds...

Dubai has always evolved quickly, but 2025 felt less about speed and more about depth. The residential market wasn't just active—it showed clear signs of maturity. What stood out was not simply the volume of transactions, but the underlying confidence driving them. Population growth remained strong, international relocation continued at pace, and Dubai further reinforced its position as a stable, forward-looking base for both individuals and global businesses. Real estate once again reflected that confidence, acting as a barometer for how people view the city's long-term prospects.

Beyond the headline figures, some of the most meaningful progress took place quietly. Improvements in rental valuation frameworks, enhanced transaction protections, advances in digital banking, and targeted buyer incentives have all contributed to a more transparent and reliable market. At the same time, wider economic reforms, an increasing focus on ESG considerations, and growing participation from institutional investors are steadily reshaping the landscape. Together, these shifts are helping Dubai align more closely with established global real-estate hubs—while still preserving the momentum that sets it apart.

At Ammos Crest, our performance this year was driven by a clear principle: local intelligence matters more than ever. As the market broadens and choice increases, success depends on understanding the nuances—how individual communities function, how buyers and tenants behave within them, and where real value is created over time. That depth of insight allows us to advise decisively, whether the objective is a transaction today or a strategy for the years ahead. For us, progress isn't measured by volume alone, but by the quality of guidance we deliver and the confidence it gives our clients.

● TOKENIZATION OF REAL ESTATE LAUNCHED

Dubai has introduced real-estate tokenization, enabling fractional ownership through blockchain and opening property investment to a wider pool of global investors.

● DIGITAL BANKING SECURITY UPGRADE

UAE banks have replaced traditional OTPs with secure in-app approval systems, significantly strengthening transaction security and fraud prevention.



6 Key Announcements in 2025

● NEW PROPERTY SALE RULE FOR OVERSEAS SELLERS

From June 2025, non-resident property sellers must hold a UAE bank account to receive sale proceeds, and payments can only be issued directly to the title deed holder and Power of Attorney recipients can no longer receive funds on the owner's behalf.

● FIRST-TIME HOME BUYER PROGRAM LAUNCHED

Dubai has introduced a First-Time Home Buyer initiative offering incentives and easier access to ownership, aimed at increasing end-user participation in the market.

● SMART RENTAL INDEX 2025

The 2025 Smart Rental Index introduces a clearer, data-led approach to rental pricing, ensuring rent adjustments are more closely aligned with current market conditions.

● DUBAI RESIDENTIAL REIT LAUNCHED

Dubai Holding successfully launched the Dubai Residential REIT (Real Estate Investment Trust), marking a major step in institutionalising Dubai's residential rental market and expanding investor access through public

Dubai Residential Market Overview

SALES - SECONDARY MARKET | 2025 Dubai's secondary residential sales market recorded a **strong performance in 2025**, with total transaction value reaching AED 541.5 billion, **up 26.9% year on year**, alongside an **18.9% increase**.

in transaction volume to 200,780 deals. Growth was driven primarily by apartments and villas, reflecting sustained demand from end users and long-term investors seeking completed, income-generating assets. Apartments accounted for the largest share of sales value at **AED 323.9 billion**, while villa transactions rose sharply to **AED 142.5 billion**, highlighting continued appetite for larger homes and lifestyle-led communities.

The fact that value growth outpaced volume growth indicates **price appreciation across established communities**, supported by population growth, job creation, and strong household formation, rather than speculative activity.

LEASING - SECONDARY MARKET | 2025

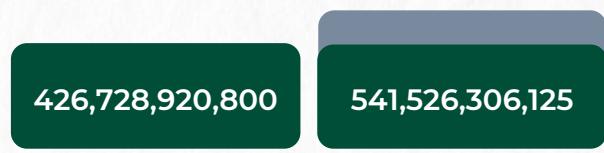
Dubai's residential leasing market continued to strengthen in 2025, with total leasing value increasing by **10.6% year on year to AED 51.6 billion**, while transaction volumes rose marginally by **1.2% to 588,318 contracts**. This gap between value and volume growth reflects a market shaped by **rental rate increases rather than higher tenant turnover**, as demand for completed homes remained elevated amid limited immediately available supply in key locations.

Apartments dominated leasing activity with **AED 39 billion** in rental value, while villas also recorded growth, reinforcing demand from families and long-term residents.

Overall, the leasing market's performance points to **pricing resilience and tenant stability**, as Dubai transitions from rapid rental escalation toward a more balanced, sustainable leasing environment.

Dubai Residential **Sales** Transactions 2025

SALES TRANSACTIONS VALUE (AED) - YOY



2024

2025

26.9%

% Increase YoY

SALES TRANSACTIONS VOLUME - YOY



2024

2025

18.9%

% Increase YoY

SALES RESIDENTIAL TRANSACTIONS VOLUME BY PROPERTY TYPE 2024 VS 2025 BREAKDOWN

PROPERTY TYPE

2024

2025

	Apartment	137,005	166,288		21.37%
	Townhouses	22,349	23,109		3.4%
	Villas	9,615	11,381		18.37%

SALES RESIDENTIAL TRANSACTIONS VALUE (AED) BY PROPERTY TYPE 2024 VS 2025 BREAKDOWN

PROPERTY TYPE

2024

2025

	Apartment	251,912,167,209	323,934,779,899		28.6%
	Townhouses	67,750,170,714	75,132,577,335		10.9%
	Villas	107,066,582,877	142,458,948,891		33%



Dubai Residential **Leasing** Transactions 2025

LEASING TRANSACTIONS VALUE (AED) - YOY



LEASING RESIDENTIAL TRANSACTIONS VOLUME BY PROPERTY TYPE 2024 VS 2025 BREAKDOWN

PROPERTY TYPE	2024	2025
Apartment	521,391	529,492
Townhouses	21,707	23,721
Villas	33,150	32,234

+1.55%
+9.28%
-2.76%

LEASING RESIDENTIAL TRANSACTIONS VALUE (AED) BY PROPERTY TYPE 2024 VS 2025 BREAKDOWN

PROPERTY TYPE	2024	2025
Apartment	35,273,349,541	38,965,814,445
Townhouses	3,425,106,287	4,058,683,127
Villas	7,916,650,822	8,548,825,128

+10.47%
+18.5%
+8%

Top 5 Residential Area's BASED ON 2025 TRANSACTIONS

In 2025, Dubai's highest-performing areas by transactions were driven by liquidity, affordability, and depth of completed stock rather than headline pricing. JVC led due to its accessible price points and strong rental demand, making it one of the city's most tradable investment markets. Business Bay ranked highly by combining central location with consistent tenant demand and higher average ticket sizes, supporting both volume and value.

Dubai South benefited from long-term infrastructure and employment growth expectations, while Dubai Land Residence Complex and Motor City performed well as value-led, end-user communities with steady leasing demand. Overall, these areas outperformed because they sit in the market's most active affordability bands, where properties trade frequently and liquidity remains high.

AREAS BY TRANSACTIONS		VOLUME	VALUE (AED)
1	Jumeirah Village Circle (JVC)	17,933	19,779,514,409
2	Business Bay	11,874	27,808,664,018
3	Dubai South	9,820	20,465,272,391
4	Dubai Land Residences Complex	7,802	6,764,663,558
5	Motor City	5,828	7,679,927,731



Off-Plan Overview

In 2025, Dubai's off-plan market emerged as the **primary driver of sales activity**, supported by strong investor confidence, regulatory enhancements, and sustained developer launches.

Total off-plan transaction volumes increased by 26.1% year on year, rising from 110,272 transactions in 2024 to 139,116 in 2025, with sales activity led by major developers such as **Emaar, DAMAC, Nakheel, Binghatti, and Sobha Group**, reflecting a strong preference for established names and proven delivery track records.

This momentum was further reinforced by key structural developments, including enhanced regulatory transparency, improved banking security, the introduction of real-estate tokenisation, and first-time buyer initiatives, positioning off-plan property as the **preferred investment channel in 2025**, offering a compelling balance of capital appreciation, phased capital deployment, and long-term value creation within Dubai's real estate market.

In 2025, off-plan townhouse and villa transactions increased in volume but declined in total value, indicating a shift toward **more affordable, smaller-format homes rather than high-priced units**. Buyers remained active but more price-conscious after several years of strong growth, with several developers by launching lower entry-price products to drive absorption. Reflecting a maturing market, this shift shows demand broadening beyond luxury niches. A pivot toward end-user affordability and a more even distribution of sales are key drivers ensuring the future resilience of the UAE's off-plan sector.

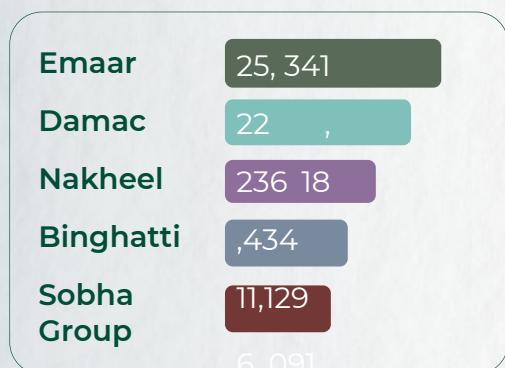
OFF-PLAN TRANSACTIONS VOLUME BY PROPERTY TYPE
2024 VS 2025 BREAKDOWN

	2024	2025	
Apartment	91,374	118,038	+29.18%
Townhouses	13,545	13,974	+3.17%
Villas	5,353	7,104	+32.7%

OFF-PLAN TRANSACTIONS VALUE (AED) BY PROPERTY TYPE
2024 VS 2025 BREAKDOWN

	2024	2025	
Apartment	161,969,853,927	223,722,141,109	+38.1%
Townhouses	29,140,442,116	24,296,243,111	-16.6%
Villas	6,941,159,248	6,196,008,133	-10.7%

TOP 5 DEVELOPERS
BY SALES VOLUME



OFF-PLAN TRANSACTIONS VOLUME
2024 VS. 2025



Off-Plan Communities to Watch in 2026

1 DUBAI CREEK HARBOUR Set to evolve into a major lifestyle and tourism hub, supported by the planned **Dubai Creek Tower** and **Creek Square Mall**, the community remains in its growth phase, offering attractive medium- to long-term capital appreciation potential.

2 THE OASIS BY EMAAR Emaar's flagship villa community offers strong value, with off-plan pricing around **AED 1,900 per sq ft**, well below comparable ready villas in prime locations. Further releases in 2026 support continued investor interest.

3 EXPO CITY DUBAI Still early in its appreciation cycle, Expo City is expected to gain momentum in 2026 as major global events relocate to the district and first residential handovers unlock resale and leasing activity.

4 DUBAI ISLANDS A large-scale coastal destination spanning **five islands**, designed around beachfront living, hospitality, and leisure, with supporting retail infrastructure such as **Dubai Islands Mall** enhancing long-term demand.

5 DUBAI MARITIME CITY Centrally located waterfront district between **Port Rashid** and **Dubai Dry Docks**, benefiting from improved connectivity and proximity to key economic hubs, positioning it as an early-stage urban waterfront opportunity.



Looking into 2026

Dubai's real estate market heads into 2026 from a position of exceptional scale and resilience.

Dubai's real estate market enters **2026 from a position of scale and resilience**, having recorded close to **200,000 transactions in 2025** with total sales value exceeding **AED 541 billion**, a level that places Dubai among the world's most active real estate markets. After nearly five years of continuous price growth, the market is now moving into a **more stable and selective phase**, marked by modest price softening and yield compression driven by higher pricing, increased choice, and a more discerning buyer base rather than weakening demand.

Looking ahead, **2026 is expected to be defined by stability, transparency, and institutional maturity**, supported by regulatory enhancements, improved market governance, and new investment structures such as real estate tokenisation and the Dubai Residential REIT.

As urgency normalises, developers are responding with more flexible pricing and payment structures, creating a healthier, more balanced environment. In this context, investors must clearly prioritise either **income (ROI)**, best achieved through mid-market apartments, **or capital growth (ROE)**, where prime assets, emerging waterfront districts, and low-supply villa communities offer stronger long-term upside. Balanced growth areas such as Dubai Islands and Expo City provide a middle ground, reinforcing that success in 2026 will depend on **clear strategy and disciplined asset selection**, not chasing both yield and growth simultaneously.

About Ammos Crest Real Estate

As a Dubai-based real estate advisory built on trust, insight, and long-term relationships. With over 12 years of industry Experience , we specialise in residential sales and leasing, off-plan investment advisory, and strategic property marketing.

Backed by deep local expertise, international reach, and a data-driven approach, our team provides clear, honest guidance at every stage, helping clients make confident, long-term decisions in Dubai's property market.



Our Services

OFF-PLAN INVESTMENT ADVISORY

We provide strategic, data-driven guidance for investors seeking high-growth off-plan opportunities across Dubai. Our team supports clients through every stage, **from sourcing projects and analysing market performance to acquisition and exit strategies.**

Backed by in-house research and a global network of qualified buyers and sellers, we offer clear, impartial advice to help maximise long-term returns.

OFF-PLAN PROPERTIES

Our Off-Plan division works closely with Dubai's leading developers, including Emaar, Damac, Danube, Ellington and more, giving clients **access to prime launches and exclusive opportunities.**

With a multilingual team fluent in Arabic, English, Russian, Chinese, Spanish, French, Italian Hindi, Urdu and additional languages, we serve a diverse global audience and deliver tailored investment solutions across the MENA region's fastest-growing real estate markets.

REAL ESTATE AGENCY

Our agency division specialises in residential sales and leasing, and property marketing. With deep community expertise and international reach, we offer a seamless experience for buyers, sellers, landlords, and tenants.

From valuations and negotiations to exclusive listings and premium marketing, our brokers ensure informed guidance and exceptional results.

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admin@acredxb.com



+971 58 2812786



ammoscrest.com